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Thailand

HRI Food Service Sector

2005

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Report Highlights:
Thailand is Southeast Asia's second largest economy and its economy has shown remarkable improvement with forecast growth of 6.4 percent for year 2004. Thailand imported $102 million in consumer oriented foods from the U.S. in 2004 (Jan.-Nov.), up 43 percent over 2003's $71 million. The HRI food service sector comprises approximately 150,000 outlets including some 100,000 restaurants and more than 5,000 hotels and resorts. Thai consumer expenditure on food at all food service outlets was estimated at $6.7 billion for 2003.

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Market Overview

Thailand is Southeast Asia's second largest economy and its economy has shown remarkable improvement with Gross Domestic Product (GDP) growth forecast to be 6.4 percent for 2004, while the projected GDP growth rate for 2005 is around 5.5-6.0 percent. The major driver behind this growth in 2004 was exports, which are expected to reach a record US$96 billion, same 22.5 percent higher than 2003. Domestic spending and increases' private investment also helped drive overall economic activity. Higher consumer confidence resulting from falling unemployment and rising farm and non-farm incomes have boosted consumption expenditures, which have a positive effect on the HRI sector. Per capita income increased from $1,966 in 2002 to $2,196 in 2003. The Thai baht firmed in 2004, with the baht reference rate averaging 40.27 to the U.S. dollar in 2004, considerably stronger than the 41.53 recorded in 2003.

Due to the excess liquidity of Thai banks and financial institutions, special promotional packages of personal loans and credit facilities are being introduced to Thais, especially the low to middle income segment. This "easier credit" has stimulated the purchasing power of Thai consumers, changed the buying and consumption pattern, helped encourage Thai people to eat out more and is pushing the growth in the overall foodservice market. In October 2004, the unemployment rate accounted for 1.6 percent of total workforce, which reflected a decrease from the same period of last year. The employment in the agriculture sector expanded at 2 percent whereby the hospitality sector had growth of 4.7 percent.

Thailand's Key Economic Indicators (* in Billion)

	Unit	2000	2001	2002	2003	2004
- Population	Mil.	61.88	62.31	62.80	63.08	63.51
- GDP at constant 1998 price	Billion Baht*	3,009	3,073	3,239	3,458	-
- GDP Growth	percent	4.8	2.1	5.4	6.8	-
- GNP Per Capita	Baht	77,659	80,249	84,540	91,219	-
- Inflation Rate (CPI)	percent	1.6	1.6	0.7	1.8	2.6
- Foreign Trade						
Export	Billion USD*	67.9	63.1	66.1	78.1	79.0
Growth	percent	19.5	-7.1	4.8	18.2	23.8
Import	Billion USD*	62.4	60.6	63.4	74.3	78.1
Growth	percent	31.3	-3.0	4.6	17.4	28.6
- Trade Balance	Billion USD*	5.5	2.5	2.7	3.8	0.9
- Balance on Current Account	Billion USD*	9.3	6.2	7.0	8.0	5.3
- Balance of Payments	Billion USD*	-1.6	1.3	4.2	0.1	3.6
- Average Exchange Rate	Baht/USD	40.2	44.5	43.0	41.5	41.3

Source: Bank of Thailand

The Thai economy remains likely to grow as targeted for 2005 although tourism has been affected by the December 2004 tsunami keep the country's Southern Andaman coast. It is estimated that foreign arrivals in the six tsunami-affected southern Andaman provinces—Phuket, Phang-nga, Krabi, Trang, Ranong and Satun - would reduce by 75% in the first quarter and 50% in the first half of year.

Thailand imported $102 million in consumer oriented foods from the U.S. in 2004 (Jan.-Nov.), up 43 percent over 2003's $71 million. Thailand's large highly competitive HRI food service sector comprises approximately 150,000 outlets including some 100,000 restaurants and more than 5,000 hotels and resorts. There are low barriers to entry that allow newcomers to enter the market quickly. Hotels, resorts, restaurants and institutional service are heavy users of imported food for food preparation, as are ready-to-eat meals at restaurants, catering services for airlines and cruise Ines. Thai consumer expenditure on food at all food service outlets was estimated at $6.7 billion for 2003.

Thai Consumer Expenditure on Food by Foodservice 1999-2003 (US$ million)

Food expenditure	1999	2000	2001	2002	2003
Food Service	5,469	5,659	5,867	6,204	6,682

Source: Euromonitor

Tourism Industry

In general, the tourism industry has grown since the beginning the late 1990s as foreign tourists increasingly came to Thailand. This sector has also continually benefited from the sustained efforts of the government to promote tourism in Thailand. With about 706 billion Baht (US$ 17.7 billion) in tourism revenue from both international and domestic tourists in 2004, representing about 10% of Thailand's GDP, the tourism industry holds an important role in generating income and growth for the country. Thailand’s diverse geography offers a tremendous range of adventures and activities for tourists such as diving, sailing, trekking, golfing, cave explorations, and rock climbing.

This helps make Thailand one of the world’s most favorite tourist destinations, with nearly 12 million tourists visiting Thailand in 2004 (up by 20 percent from the previous year). Total spending by international tourists on food and beverage was Baht 52 billion (US$1.3 billion) in 2003. They are staying longer than in previous years now up to about 8 days on average. Average spending per tourist is about Baht 4,000 (US$100) per day. Approximately 57 percent of the tourists came from East Asia, with a large increase in the number of tourists from neighboring countries, namely Malaysia, Vietnam, Korea, Hong Kong, the Philippines, Cambodia, and Indonesia. Tourists from Europe and the United States showed stable growth and accounted for 25 and 7 percent of the total number of international tourists, respectively.

Tourism Overview, Thailand 2000-2004 (before Tsunami 2004)

Year	International						
	Tourist		Average	Average Expenditure		Revenue	
	Number (Million)	Change %	Length of Stay (Days)	/person/day (Baht)	Change (%)	Million (Baht)	Change (%)
2000	9.51	+10.82	7.77	3,861	+4.23	285,272	+12.75
2001	10.06	+5.82	7.93	3,748	-2.93	299,047	+4.83
2002	10.80	+7.33	7.98	3,754	+0.16	323,484	+8.17
2003 /1	10.00	-7.36	8.19	3,774	0.55	309,269	-4.39
2004 /2	12.00	19.95	8.00	4,000	5.97	384,000	24.16
2005 /2	13.38	11.5	8.10	4,150	3.75	450,000	17.19

Year	Domestic						
	Thai Visitor		Average	Average Expenditure		Revenue	
	Trip (Million)	Change %	Length of Stay (Days)	/person/day (Baht)	Change (%)	Million (Baht)	Change (%)
2000	54.74	+2.08	2.48	1,718	+12.79	210,516	+3.61
2001	58.62	+7.09	2.51	1,703	-0.89	223,732	+6.28
2002	61.82	+5.45	2.55	1,690	-0.77	235,337	+5.19
2003 /1	69.36	12.2	2.61	1,824	7.98	289,987	23.22
2004 /2	73.18	5.51	2.65	1,895	3.87	322,300	11.14
2005 /2	76.25	4.19	2.65	1,965	3.69	347,300	7.76

Remark: /1 = Trend /2 = Target

Source: Tourism Authority of Thailand

The significant supporting factor for tourism in 2006 is the planned opening of the Suvarnabhumi International Airport, which will be instrumental in making Thailand a regional travel hub. An increase in the number of tourists of about 32.56 percent from 2003 to nearly 12 million in 2004 is due to the continual launching through 2003 and 2004 of various aggressive marketing campaigns by the Tourism Authority of Thailand that have been aimed a t promoting the tourism industry of Thailand. The goal is to turn the country into the tourism hub of Asia by 2006 by offering a variety of tourist products, emphasizing the distinctive hospitality of the Thai culture, focusing on eco-tourism as it develops into a new global trend, and by targeting both the youth market and the luxury, up-scale tourist segment.

Number of International Tourists Arrivals: 2003-2004 (Jan.-Sept.)

Country of Residence	2004		2003		% Change
	Number	%Share	Number	%Share	2004/2003
East Asia	1,985,246	23.3	1,609,983	23.21	23.31
Europe	1,991,415	23.38	1,757,919	25.34	13.28
The Americas	586,939	6.89	471,616	6.8	24.45
South Asia	363,746	4.27	288,666	4.16	26.01
Oceania	344,000	4.04	256,769	3.7	33.97
Middle East	215,025	2.52	136,059	1.96	58.04
Africa	66,699	0.78	53,003	0.76	25.84
Grand Total	**8,518,833**	**100**	**6,937,038**	**100**	**22.80**

Source: Tourism Authority of Thailand

At present, Thailand has developed into a major convention and incentive destination for the Asian Region, competing with Singapore and Hong Kong. Meetings, Incentives, Conventions and Exhibitions (MICE) visitors accounted for about 15-17 percent of the 9.7 million tourist arrivals in Thailand in year 2003. However, the average spending per day is almost double that of regular leisure tourists. They earned the country Baht 34 billion (US$ 850 million), a 24 percent in crease from 2002. The number of arrivals for convention purposes increased from 89,677 in 2001 to 106,853, or by 19.15%, in 2002. This is not only because of the many modern convention/exhibition centers and four- and five-star hotels that can accommodate large group meetings, but is also due to the strong promotion by the government.

International Conventions/Meetings in Thailand

	1999	2000	2001	2002	2003*	2004*
No of Events	914	1,324	1,066	1,292	1,373	1,469
% Change	13.8	44.9	-19.5	21.2	6.3	7.0
No. of Foreign Participants	77,205	98,895	102,953	114,800	129,657	146,632
% Change	15.2	28.1	4.1	11.5	12.9	13.1

Source: the Tourism Authority of Thailand (TAT)
* Estimates by TAT

The MICE market is forecast to expand more due to heightened awareness of Thailand's attractions after the APEC events of 2003 and the 15th International AIDS Conference in 2004, when Thailand played host to these important events, the lower costs offered by Thai convention facilities, and convenient, effective infrastructure such as the sky train, subway and the new airport. Currently, Thailand has five convention and exhibition centers that meet international standards: the Queen Sirikit National Convention Center, BITEC, IMPACT, the Pattaya Exhibition and Convention Hall (PEACH), and the Golden Jubilee Convention Hall in Khon Kaen. Plans to establish the MICE Bureau, new two convention centers in Chiang Mai and Phuket, as well as the opening of the Central World Plaza hotel and Convention

Center in the center of downtown Bangkok will also help to increase the competitive advantages of Thailand.

Effects from tidal waves on Thailand macroeconomic outlook

The massive earthquakes and tidal waves in Indonesia brought their destructive force to Thailand on 26 December 2004 and left the six southern provinces of Phuket, Phang-Nga, Ranong, Krabi, Trang, and Satun with a range of damage from complete to minimal. In some areas many of the hospitality facilities were completely destroyed, while in other areas damages were slight. In Phuket and Krabi, hotels and restaurants are the largest economic sector. These two years suffered the greatest physical damage, and will take the largest to recover overall about 25% of available hospitalities/ facilities were heavily impacted. Total Gross Provincial Product (GPP) of the 6 provinces made up for 29.0% of Gross Regional Product (GRP) and 2.7% of Thailand's Gross Domestic Product (GDP). It was estimated that the only major economic impact would be on the fisheries and tourism sectors. Most of the trade sources indicated that this Tsunami impact was likely to be short-lived, with tourist numbers returning to their original level within 2-3 months overall. The tourism situation in other popular destinations is very positive, from being heavily booked in places like Bangkok, Pattaya, Samui Island and Chang Island to having availability on weekdays in places like Hua Hin, Cha am, Chiang Mai and Chiang Rai. However, it is forecasted that the trend in the Thailand tourism industry in 2005 still show a slight increase and the HRI industry in general is expected to achieve a higher growth rate of approximately 6-8%.

Tourism Performance - 2003 (Contribution of the six southern provinces: Phuket, Krabi, Phang-Nga, Satun, Ranong, and Trang)

Provinces	**Revenue** (Mil Baht) (US$1=Baht 40)		**Total Revenue (Mil Baht)**	**Length of Stay (no. of days)**		**Average Spend Per Day** (in Baht)	
	Foreign	**Thai**		**Foreign**	**Thai**	**Foreign**	**Thai**
Phuket	2,476,786 (67.82%) 59,836.02	1,303,291 (32.18%) 13,427.68	73263.70	5.44	3.82	3,635.63	2,774.50
Krabi	859,438 (52.95%) 11,651.51	763,779 (47.05%) 5,814.47	17,465.98	5.04	3.62	2,595.95	2,270.05
Phang-Nga	1,567,811 (67.16%) 4,297.83	766,798 (32.84%) 2,101.15	6,398.98	5.13	2.42	1,687.65	1,624.85
Satun	56,835 (12.82%) 146.37	386,510 (87.18%) 753.95	900.32	1.70	1.67	1,563.67	1,318.84
Ranong	21,350 (6.18%) 42.52	324,130 (93.82%) 950.92	996.44	2.15	1.35	1,672.37	1,505.60
Trang	52,580 (9.67%) 372.61	491,214 (90.33%) 2,054.55	2,427.16	3.78	2.80	1,954.04	1,654.43

Source: Tourism Authority of Thailand

Accommodation Available Post-Tsunami

Provinces	Hotels still in operation				
	Pre-December 26, 2005		Jan-05		% of Hotels in Operation
	No. of Hotels	No. of Rooms	No. of Hotels	No. of Rooms	
Phuket	560	31,276	423	25,762	82.37%
Phang-Nga	134	5,026	40	792	15.75%
Krabi	337	10,493	285	8,056	76.77%
Total	1,031	46,795	748	34,610	73.96%

Tourism in Phuket 2004

Type of Data	Jan. - Sep.		
	2004	2003	% Change
Visitor	**3,641,962**	**2,905,669**	**+25.34**
------Thai	1,039,346	976,546	+6.43
------Foreigners	2,602,616	1,929,123	+34.91
Tourist	**3,510,749**	**2,789,121**	**+25.87**
------Thai	963,912	905,312	+6.47
------Foreigners	2,546,837	1,883,809	+35.20
Excursionist	**131,213**	**116,548**	**+12.58**
------Thai	75,434	71,234	+5.90
------Foreigners	55,779	45,314	+23.09
Average Length of Stay (Day)	**4.66**	**4.9**	-
------Thai	3.66	3.68	-
------Foreigners	5.04	5.49	-
Average Expenditure (Baht / Person / Day)			
Visitor	**3,400.24**	**3,339.78**	**+1.81**
------Thai	2,586.48	2,567.95	+0.72
------Foreigners	3,725.21	3,730.49	-0.14
Tourist	**3,466.92**	**3,414.66**	**+1.53**
------Thai	2,684.67	2,667.05	+0.66
------Foreigners	3,762.98	3,773.93	-0.29
Excursionist	**1,615.77**	**1,547.95**	**+4.38**
------Thai	1,331.63	1,308.51	+1.77
------Foreigners	2,000.04	1,924.35	+3.93
Revenue (Million Baht)			
Visitor	**58,011.15**	**48,099.67**	**+20.61**
------Thai	9,580.59	8,987.44	+6.60
------Foreigners	48,430.56	39,112.23	+23.82
ACCOMMODATION ESTABLISHMENTS			
Establishments	579	549	+5.46
Rooms	32,076	31,302	+2.47
Occupancy Rate (%)	64.39	55.71	+8.68
Average Length of Stay (Day)	3.53	3.88	-
Number of Guest Arrivals	3,165,488	2,454,065	+28.99
----- Thai	750,126	705,612	+6.31
----- Foreigners	2,415,362	1,748,453	+38.14

Source: TAT, Southern Office

Tourism in Phang Nga 2004

Type of Data	Jan. - Sep.		
	2004	2003	% Change
Visitor	**2,264,156**	**1,744,691**	**+29.77**
------Thai	800,622	636,334	+25.82
------Foreigners	1,463,534	1,108,357	+32.05
Tourist	**607,936**	**375,647**	**+61.84**
------Thai	339,759	223,795	+51.82
------Foreigners	268,177	151,852	+76.60
Excursionist	**1,656,220**	**1,369,044**	**+20.98**
------Thai	460,863	412,539	+11.71
------Foreigners	1,195,357	956,505	+24.97
Average Length of Stay (Day)	**3.77**	**3.61**	-
------Thai	2.7	2.45	-
------Foreigners	5.12	5.33	-
Average Expenditure (Baht / Person / Day)			
Visitor	**1,693.87**	**1,662.98**	+1.86
------Thai	1,590.03	1,531.10	+3.85
------Foreigners	1,750.67	1,738.70	+0.69
Tourist	**1,987.79**	**1,810.38**	**+9.80**
------Thai	1,766.95	1,710.40	+3.31
------Foreigners	2,267.54	1,957.74	+15.82
Excursionist	**1,585.99**	**1,622.54**	**-2.25**
------Thai	1,459.61	1,433.86	+1.80
------Foreigners	1,634.71	1,703.92	-4.06
Revenue (Million Baht)			
Visitor	**7,360.78**	**4,745.28**	**+55.12**
------Thai	2291.39	1530.23	+49.74
------Foreigners	5,069.39	3,215.05	+57.68
ACCOMMODATION ESTABLISHMENTS			
Establishments	144	96	+50.00
Rooms	6,369	2,501	+154.66
Occupancy Rate (%)	38.55	36.56	+1.99
Average Length of Stay (Day)	4.08	3.84	-
Number of Guest Arrivals	**410,280**	**245,814**	**+66.91**
----- Thai	203,158	134,015	+51.59
----- Foreigners	207,122	111,799	+85.26

Source: TAT, Southern Office

Tourism in Krabi 2004

Type of Data	Jan. - Sep.		
	2004	2003	% Change
Visitor	**1,409,584**	**1,246,114**	**+13.12**
------Thai	648,205	625,828	+3.58
------Foreigners	761,379	620,288	+22.75
Tourist	**1,161,690**	**1,013,635**	**+14.61**
------Thai	541,746	521,745	+3.83
------Foreigners	619,944	491,890	+26.03
Excursionist	**247,894**	**232,479**	**+6.63**
------Thai	106,459	104,081	+2.28
------Foreigners	141,435	128,398	+10.15
Average Length of Stay (Day)	**4.03**	**4.05**	**-**
------Thai	3.21	3.29	-
------Foreigners	4.75	4.85	-
Average Expenditure (Baht / Person / Day)			
Visitor	**2,138.85**	**2,100.80**	**+1.81**
------Thai	1,934.40	1,918.26	+0.84
------Foreigners	2,312.91	2,284.98	+1.22
Tourist	**2,277.09**	**2,243.44**	**+1.50**
------Thai	2,021.85	2,006.56	+0.76
------Foreigners	2,500.13	2,494.71	+0.22
Excursionist	**1,491.04**	**1,478.85**	**+0.82**
------Thai	1,489.39	1,475.58	+0.94
------Foreigners	1,492.28	1,481.48	+0.73
Revenue (Million Baht)			
Visitor	**11,245.48**	**9,736.09**	**+20.12**
------Thai	3,678.46	3,593.67	+2.36
------Foreigners	7,567.02	6,142.42	+23.19
ACCOMMODATION ESTABLISHMENTS			
Establishments	290	290	+0.00
Rooms	9,867	9,088	+8.57
Occupancy Rate (%)	45.47	39.16	+6.31
Average Length of Stay (Day)	2.73	2.54	-
Number of Guest Arrivals	**916,906**	**772,253**	**+18.73**
----- Thai	365,675	335,353	+9.04
----- Foreigners	551,231	436,900	+26.17

Source: TAT, Southern Office

Infrastructure

Thailand has 109 airports, including six international airports, namely Bangkok, Chiang Mai, Chiang Rai, Phuket, Hat Yai, and U Tapao. The Bangkok International Airport has two terminals and can accommodate 25 million passengers from more than 80 airlines per year. Bangkok International Airport (BIA) ideally known as, Don Muang, serves the most air traffic in Thailand with more than 80 airlines providing service to over 25 million passengers with 160,000 flights and 700,000 tons of cargo handled. Phuket International Airport ranks second in the country in terms of passengers and cargo volume. Chiang Mai International Airport is the third largest airport and is the gateway to Northern Thailand which is renowned for its breathtaking natural attractions and deep-rooted cultural traditions.

Bangkok Air Traffic Volume				
Volume/Year	**1980**	**1990**	**2000**	**2010**
International Passengers (in Thousands)	4,138	10,906	25,656	40,486
Domestic Passengers (in Thousands	452	3,423	9,360	15,481
Total	4,590	14,329	35,016	55,949
Cargo (in Thousand Tons)	111	447	1,353	2,463
Flights (in Thousands)	54	109	203	279

Thailand has a coastline of 3,219 km with over 4,000 km of waterways. Ports include Bangkok, Laem Chabang, Pattani, Phuket, Sattahip, Si Tacha and Songkhla. Currently, there are eight international deep-sea ports in operation, with four ports permitted to handle container cargo.

Current commercial ports:

- Klong Toey is the largest port in Thailand and can handle approximately 14 millions tons per year [1.4 million twenty-feet equivalent unit (TEU)/year]
- Laem Chabang can handle about 7.3 million tons per year (0.6 million TEU/yrs)

Hospitality Industry

By excluding the tsunami disaster that happened in Thailand to end 2004, in general the hotel performance has been booming since the beginning of the year, both in resort areas like Phuket and in the capital, Bangkok. Thailand's relative political stability encourages development and investment, as does its geographic location in the heart of South Asia. Add to that Thailand's reputation for an excellent service culture, it is not difficult to understand dramatic growth in hotel development throughout the country. This has been especially apparent in Chiang Mai, Phuket, Krabi, Pattaya and Bangkok.

The Tourist Accommodation Statistic 2003

Region	No. of Hotels	%Change	No. of Rooms	%Change	Average Length of Stay (days)	Occupancy Rate	%Change	No. of Guests		
								Thai Tourists	Foreign Tourists	Total
Major Tourist Destinations	4,088	+10.43	252,879	+5.71	2.11	50.39	-2.27	22,123,462	19,131,189	41,254,651
Bangkok	644	+24.81	32,831	+6.61	1.36	43.21	-1.17	4,435,681	2,019,773	6,455,454
Northern	259	+0.78	54,904	-1.51	2.02	56.45	-7.45	2,057,928	7,685,323	9,743,251
Central excl. Bangkok	522	+12.65	24,670	+8.73	1.71	44.08	-1.42	3,567,650	741,135	4,308,785
Eastern	750	+9.33	45,417	+7.59	2.33	48.92	-1.74	3,947,689	3,091,051	7,038,740
North Eastern	260	+13.54	20,476	+7.23	1.69	51.14	+1.41	4,082,416	171,430	4,253,846
Southern	1,603	+6.30	74,581	+8.60	2.91	51.85	+0.18	4,032,098	5,422,477	9,454,575

Exogenous, uncontrollable risk factors such as the attack of Tsunami in December 2004, Southern Province civil unrest, and health concerns (Avian Influenza) are major factors that negatively affected the tourism and hotel industry in 2004. It is forecasted that expected hotel occupancy rate for 2005 will be 55% for the whole country. However, the decrease in both occupancy rate and number of tourist arrivals in the six Southern provinces affected by the Tsunami will be offset by the upsurge of tourists visiting other interesting tourist destinations such as Hua-Hin, Rayong, Pataya, Trat, Surat Thani, Chiang Rai, Chiang Mai and some other provinces in the North East of Thailand.

Hotel	Occupancy Rate (%)			Average Room Rate (US$)		
	2001	2002	2003	2001	2002	2003
Bangkok Marriott Resort & Spa	71	72	67	68	68	70
Four Seasons Bangkok	61	68	59	124	121	119
Pattaya Marriott Resort & Spa	76	78	74	53	57	64
Hua-Hin Marriott Resort & Spa	77	81	71	54	59	68
Anantara Resort & Spa Hua-Hin	65	60	53	69	82	87
Anantara Resort & Spa Golden Triangle	n/a	37	34	60	60	77
Four Season Chiang Mai	64	57	47	275	286	257
Royal Garden Harbourview	32	35	37	27	30	28
JW Marriott Phuket Resort & Spa	n/a	46	67	n/a	94	101
Banyan Tree Phuket	73	68	73	407	440	441
Dusit Laguna Resort	65	63	65	131	123	94
Laguna Beach Resort	69	64	69	119	113	91
Sheraton Grande Laguna Phuket	68	64	68	161	140	110

The hospitality business in 2005 is forecasted to see a slight increase from 2004 due to expectations of positive economic conditions and some other supporting factors such as new low cost airlines, which are gaining in popularity; from the new Bangkok international Airport, and the aggressive marketing promotion strategy of Tourism Authority of Thailand. Competition in the hotel industry is expected to be high and increasing. Currently, about 20 percent of the hotel rooms in Thailand are operated by international chains and the rest by independent operators. In anticipation of future prosperity in the market, the hotel industry continues to evolve with the rest of Bangkok. Last year, many companies re-evaluated their presence in Bangkok and numerous properties changed brands to increase their competitive advantages – for example, the Hilton became a Swissotel and Le Royal Meridien rebranded to an InterContinental. Smaller, luxurious boutique hotels are beginning to enter the market.

With a number of leading international hotel chains entering the Thai market, existing hotels are readjusting their marketing strategies by focusing more on revenues received from food and beverage sales. For the 4-5 star hotels with 400 rooms or more, food and beverage sales accounts for about 40% of total revenues while these hotels spent the average of 30% to purchase these products. It is estimated that the hotel food and beverage market will grow at least 10 percent in year 2005. It is anticipated that at least 5 billion baht ($125 million) will be invested by 4-5 star hotels, as most of them will be competing on the standards and quality of their recreational, meeting and dining rooms. The entire HRI sector sources about 30-35 percent of their food products via imports, with the remainder locally keep; the U.S. has approximately 20 percent of the imported product share. U.S. beef, fruits, lobster, fish, crab, seasonings, wine, etc. are well known in the hotel/restaurant trade and with airline catering companies.

Revenues of Hotels/Guest Houses by Type of Revenues, Size of Establishment and Region 2003

(In thousand U.S.$)

Region and type of revenues	Total		Size of Establishment (rooms) Less than 60		60-149		Greater than 150	
	Amount	%	Amount	%	Amount	%	Amount	%
Whole Kingdom	1,514,937.3	100.0	79,230.4	100.0	225,392.7	100.0	1,210,314.2	100.0
Revenues from room sales	769,294.9	52.3	53,545.0	80.5	116,328.8	63.4	599,421.1	48.8
Revenues from restaurant/outlet	430,181.9	31.1	15,292.1	13.6	83,636.7	23.0	331,253.1	33.4
Revenues from function and meeting room sales	61,391.1	5.0	441.9	0.6	5,553.8	3.6	55,395.4	5.6
Other revenues	254,069.4	11.6	9,951.4	5.3	19,873.4	10.0	224,244.6	12.2
Bangkok	854,500.0	100.0	6,051.1	100.0	23,101.6	100.0	825,347.3	100.0
Revenues from room sales	429,081.9	45.9	5,524.7	89.0	17,478.3	74.3	406,078.8	44.6
Revenues from restaurant/outlet	234,649.1	35.3	318.1	7.8	3,478.0	15.9	230,853.0	36.2
Revenues from function and meeting room sales	38,448.4	6.0	-		42.9	2.1	38,405.5	6.2
Other revenues	152,320.7	12.8	208.4	3.2	2,102.4	7.7	150,009.9	13.0
Central Region	232,847.5	100.0	22,959.2	100.0	35,621.2	100.0	174,267.1	100.0
Revenues from room sales	110,333.1	59.5	12,714.4	83.0	19,536.3	65.4	78,082.4	53.8
Revenues from restaurant/outlet	60,053.0	25.8	4,231.7	9.5	11,727.8	25.5	44,093.5	28.8
Revenues from function and meeting room sales	6,927.9	4.2	199.7	0.2	882.0	5.1	5,846.2	4.6
Other revenues		10.5	5,813.4	7.3	3,475.1	4.0	46,244.9	12.8
Northern Region	98,600.9	100.0	11,198.5	100.0	27,897.7	100.0	59,504.7	100.0
Revenues from room sales	58,153.1	60.8	8,409.2	75.0	17,135.3	55.5	32,608.7	60.5
Revenues from restaurant/outlet	23,055.6	24.3	1,833.6	17.5	6,584.2	23.1	14,637.8	25.6
Revenues from function and meeting room sales	4,250.4	4.4	114.6	0.8	1,722.2	7.7	2,413.6	3.9
Other revenues	13,141.8	10.5	841.1	6.7	2,456.1	13.7	9,844.7	10.0
Northeastern Region	44,437.3	100.0	6,134.2	100.0	20,544.6	100.0	17,758.5	100.0
Revenues from room sales	24,965.0	58.1	5,279.9	85.5	11,455.8	55.3	8,229.3	49.7
Revenues from restaurant/outlet	8,442.7	23.1	408.8	6.7	3,418.8	23.0	4,615.1	31.0
Revenues from function and meeting room sales	3,842.2	7.1	22.6	7.2	2,165.4	7.2	1,654.2	9.7
Other revenues	7,187.4	11.7	422.9	5.9	3,504.6	14.5	3,260.0	9.6
Southern Region	284,551.6	100.0	32,887.5	100.0	118,227.5	100.0	133,436.7	100.0
Revenues from room sales	146,761.9	67.4	21,616.9	76.2	50,723.0	64.4	74,422.0	68.1
Revenues from restaurant/outlet	103,981.6	22.9	8,499.9	19.8	58,428.1	24.3	37,053.6	22.3
Revenues from function and meeting room sales	7,922.1	1.6	105.0	1.0	741.2	1.2	7,075.9	2.2
Other revenues	25,886.0	8.1	2,665.7	3	8,335.2	10.1	14,885.1	7.4

Source: National Statistical Office

Remark: Exchange Rate = Baht40.00/U.S.$1

Average no. of customers per day using the hotel's restaurant 2003

Region and size of establishment	Average number of customers per day	Thai		Foreigner	
		Number	%	Number	%
Whole Kingdom	123,559	58,062	47.0	65,497	53
Fewer than 60 rooms	11,270	6,033	53.5	5,237	46.5
60-149 rooms	19,729	11,136	56.4	8,593	43.6
Over 150 rooms	92,560	40,893	44.2	51,667	55.8
Bangkok	62,008	27,889	45.0	34,119	55
Fewer than 60 rooms	758	247	32.6	511	67.4
60-149 rooms	2,956	1,949	65.9	1,007	34.1
Over 150 rooms	58,294	25,693	44.1	32,601	55.9
Central Region	20,429	10,078	49.3	10,351	50.7
Fewer than 60 rooms	3,089	2,327	75.3	762	24.7
60-149 rooms	4,345	2,765	63.6	1,580	35.4
Over 150 rooms	12,995	4,986	38.4	8,009	61.6
Northern Region	15,494	9,955	54.3	5,539	35.7
Fewer than 60 rooms	2,158	1,464	67.8	694	32.2
60-149 rooms	2,959	2,010	67.9	949	32.1
Over 150 rooms	10,377	6,481	62.5	3,896	37.5
Northeastern Region	6,037	5,197	86.1	840	13.9
Fewer than 60 rooms	781	685	87.7	96	12.3
60-149 rooms	2,836	2,423	85.4	413	14.6
Over 150 rooms	2,420	2,089	86.3	331	13.7
Southern Region	19,591	4,943	25.2	14,648	74.8
Fewer than 60 rooms	4,484	1,310	29.2	3,174	70.8
60-149 rooms	6,633	1,989	30.0	4,644	70
Over 150 rooms	8,474	1,644	19.4	6,830	80.6

Source: National Statistical Office

Restaurant Industry

The restaurant industry in Thailand continues to show high growth throughout 2005 in line with the overall economic growth and the higher levels of Thai consumer confidence, which translates into increased spending on restaurants and other food services. It is estimated that the sales value of restaurant business will increase up to US$ 5 billion by the end of 2005 at a 6 percent projected growth rate.

Monthly Restaurant Turnover 2003

Month	Turnover (US$ million)
January	300.31
February	282.24
March	303.91
April	331.39
May	346.79
June	345.79
July	363.71
August	370.56
September	352.06
October	355.43
November	366.03
December	432.42
Total	**4,151.00**

The restaurant business is one of the most competitive industries in Thailand. Food outlets are everywhere, from small carts dotting every street and pathway to five-star restaurants in some of the world's finest hotels. Restaurant Businesses in Thailand can be divided into three categories as follows:

1. **Quick Service Restaurants** has occupy about a 6 per market share of the overall restaurant industry and have become increasing popular in Thailand, with a projected annual growth rate of 10-15 percent. Patrons of QSRs in Thailand today comprise an increasingly diverse group. The traditional family group, office workers, teenagers and tourists all form part of the expanding QSR market. Conventionally, about 80 percent of a total food franchises in the Thai market are formed through partnerships with US brands, leading examples being McDonald's, Starbucks and Burger King. Currently, the brands within the QSR market in Thailand cater only to the top one-third of all Thai consumers due to the limited spending power in the remaining two-thirds of the market. Therefore, there is still more opportunity for this QSR market to penetrate to the latter category. It is estimated that the QSR market will grow to reach nearly US$500 Million at the end of 2006.

The QSR market is mainly dominated by franchising businesses (90%), which are chicken (37%), burger (14%), pizza (18%), ice cream (11%), and others (20%). The examples of QSRs currently operating in Thailand are KFC, McDonalds, the Pizza Company, Pizza Hut, Burger King, Dairy Queen, A&W, Chester's Grill, Subway, Auntie Anne's, Baskin Robbins, Sizzler, Swensen's, etc. At present, the QSR sector in Thailand has encountered some effects from the consumer trend towards more healthy products, as most Thai consumers perceive that fast food products contain less valuable nutrition than ordinary Thai food. In addition to this, the growth of the QSR restaurant segment has also been hindered by the expansion of local SMEs restaurants into hypermarkets and department stores.

Growth of the Thai Quick Serve Restaurant Market (2004-2006)

	2004	2005	2006
Restaurant Sales (Mil. U.S. Dollar)	6,340	6,816	7,327
QSR Market Size (Mil. U.S. Dollar)	400	443	490
QSR Market Share (%)	6.3	6.5	6.7

Source: Industry estimates

Comparative Market Share in the Thai QSR Market (US$1=Baht40)

Revenue (in Mil. U.S. Dollar)	2001		2002		2003	
	Revenue	(%)	Revenue	(%)	Revenue	(%)
Pizza	43	14.2	57	17.3	65	18.4
Chicken	124	40.8	126	38.3	132	37.4
Hamburger	55	18.1	56	17.0	48	13.6
Ice Cream	32	10.5	35	10.7	39	11.0
Other	50	16.4	55	16.7	69	19.6
Total Market	304	100.0	329	100.0	353	100.0

Source: Ministry of Commerce and industry estimates

The pizza segment continued to provide the fastest growth within the market with an estimated 13% increase in 2003. The home delivery/takeaway is performing moderately, with about 4 percent in the number of units in 2003 and the share held predominantly by pizza operators, with major brands such as The Pizza Company and Pizza Hut leading the sector. The Pizza Company is now a market leading 70% share of the national pizza market. The highly competitive natural of this Pizza market has pushed all market players to offer highly innovative, quality products. New menu additions for home delivery such as hot and sour flavors of chicken wings and dessert have been introduced to the market to differentiate themselves from other players in the market.

2. International/High-end Restaurants The sector that occupies the highest growth in restaurant industry with total market value not less than U.S.$ 250 million. It is estimated that the market share for this restaurant type is approximately 9.2 percent. In Thailand, Japanese restaurants are ranked number one in terms of consumer preference, followed by American, Italian, Chinese and Vietnamese cuisine in that order.

Value of Full Service Restaurants 2000-2003 (US$million)

	2000	2001	2002	2003
- Casual dining	1,088	1,243	1,315	1,406
- Pizza Full-service restaurants	46	50	55	60
- Other Full-service restaurants	5,122	5,352	5,623	5,928
--Family/local	2,813	2,931	3,075	3,232
--Hot pot & grill	182	191	202	215
--International	111	117	122	129
--Japanese	74	90	111	136
--Western	66	69	71	74
--Other	1,876	1,954	2,042	2,142
Total	6,256	6,645	6,993	7,394

3. Small Restaurant (SMEs-Small Medium Enterprises) Most of new entrepreneurs who want to have their own restaurants will first enter into this market as SME-type restaurants due to the low initial investment required to start up this type of business. The industry estimates that the market share for this sector will reach about 84.6 percent of all restaurants in 2005. The Thai marketplace has been changed over the short-term by the massive influence of the hypermarkets and their co-located small neighborhood shopping centers. Their food courts have raised standards in the market and taken market share primarily at the expense of street vendors. This sector recorded total sales value of US$140 million in 2003.

Income and percentage of food consumption

	Units	1999	2000	2001	2002
Per capita income	$/capita	1,986	1,958	1,831	1,966
% of disposable income spent on food	Percent	33.3	32.2	33.9	33.6
% spent eating out	Percent	6.3	7.0	7.4	7.7

The increasing numbers of new restaurants and their popularity among consumers has keep taken market share from hotels' F&B outlets. General restaurants have been replaced in the market by restaurant chains such as Oishi, Fuji, Zen, MK Suki, S&P, Black Canyon, Seefah restaurant, etc. Currently, Thailand possesses over 1,000 fast food branches nationwide. Fast food products are made available in an increasing number of outlets and have become more popular as nowadays most Thai consumers can purchase lunch boxes, burgers, hot and cold drinks and ready-to-eat foods in convenience stores or supermarkets near their workplace or home.

Recently, the growth of fast food outlets has decreased, mainly due to the change in Thai consumers' eating habits to include more healthy and ethnic cuisines. Consumer trends in Thailand always keep evolving. As more Thais travel abroad and receive greater exposure to foreign trends, these are also exerting significant influence on the food service market in Thailand. For example, Japanese foods (Ramen restaurants and Japanese-style buffet restaurants) are emerging as a popular type of foreign food in Thailand, while Japanese fad are widely appreciated and adopted among Thai teenagers. Since Thai consumers generally eat less beef, many burger chains have diversified their menus to include pork, chicken, fish, and vegetables to accommodate local tastes.

Traditionally, Thai families enjoy dining out, but most families, especially in the provinces, prefer to cook at home for everyday meals. Recently, home delivery and takeaway has witnessed a surge in its consumer base, and is valued for its convenience and speed, especially so among working professionals. An increase in eating out and patronizing restaurants is especially prominent among the younger generation, as well as working professionals, as it is more convenient and efficient than cooking at home. The large variety of food establishments in the market has also resulted in a considerable increase in foodservice expenditure. There are many more choices than before.

Catering Service Business

The Thai catering market has become increasingly concentrated and competitive among hotels and the restaurant sector. Catering businesses range from small to large-scale businesses and are categorized into four categories: contract caterers (Compass Group, F&B International Co.), airline and exhibition caterers (Thai Airways International Plc., Siam Flight, Gate Gourmet (Thailand) Ltd., BITEC, Impact Arena), hotels and medium-high end restaurants, and local small caterers. It is estimated that there are more than 200 local caterers, which are managed by owner-proprietors and family members provide catering services focused only on clients in some particular geographic area and some special functions such as local wedding ceremonies, birthday parties, seminars, new house ceremonies, etc.

Some of the medium-sized catering services infrequently import directly, usually purchasing through recognized and established importers and distributors. The target groups of the contract catering services in Thailand are the customers at workplaces, ranging from employee restaurants to executive dining. These clients include local, national and international organizations; military services; hotels; hospitals; office buildings and airlines. Hospitals, office buildings, and large factories are providing more cafeterias or food court for their staff and customers. These contract-catering services use both local and imported food products, depending upon their customers' requirement. Approximately 10 percent of these menus use imported products such as french fries, beef, salmon, lamb, sauces and seasonings, cheese, fresh fruits & vegetables, seafood, turkey, and a variety of beverages. For Thai Airways, which is a government enterprise, it has to comply with the government's objective of promoting Thai products. Thai Airways, Siam Flight and Gate Gourmet use approximately 20 percent of imported food for their airline catering service.

SECTION II: MARKET OPPORTUNITIES

- Thailand, covering 198,114 square miles, is situated in the heart of Southeast Asia and is considered the gateway to Indochina. Thailand borders Laos in the north and northeast, Burma in the north and west, the Andaman Sea in the west, Cambodia and the Gulf of Thailand in the east, and Malaysia in the south. There is a population of 64.9 million at the end of 2004. Theravada Buddhism is the national religion and is actively practiced by about 95% of Thais, with the remainder practicing Islam, Christianity, Hinduism and other faiths. About 46 million Thais are 15-64 years old (68.7%).
- The size of the work force now exceeds 34 million, with the majority of the workforce under 30 years of age.
- The minimum wage in Thailand is currently 175 baht per day (US$4.38) in Bangkok, and between 133-168 baht (US$3.10-3.91) per day in other provinces.

Thailand Minimum Daily Wage

The minimum wage in Thailand is currently 175 baht per day (US$4.48) in Bangkok, and between 133-173 baht (US$3.41-4.43) in other provinces.

Provinces	Baht/Day	USD/Day
Phuket	173	4.43
Bangkok, Samut Prakarn, Nonthaburi, Pathum Thani, Nakhon Pathom, Samut Sakhon	175	4.48
Chonburi	157	4.02
Nakron Ratchasima and Saraburi	150	3.84
Kanchanaburi, Chanthaburi, Phetchaburi, Ratchaburi, Samut Songkhram, and Ang Thong	142	3.64
Chachoengsao and Krabi	144	3.69
Singburi and Narathiwat	135	3.46
Chiang Mai and Phang Nga	149	3.82
Ranong and Rayong	147	3.77
Ayuddhaya	146	3.74

Chumphon, Lamphun, Sa Kaeo, and Sukhothai	141	3.61
Khon Kaen, Trang, Buriram, Prachin Buri, Lop Buri, Sing Buri, and Suphan Buri	140	3.59
Nakhon Nayok and Phichit	138	3.53
Chiang Rai, Nan, Phayao, Phrae, Maha Sarakham, Mae Hong Son, Yasothon, Surin, and Ubon	137	3.51
The rest of the country	133	3.41

Source: Bank of Thailand
Remark: 1 USD = Baht 39 (2004)

- Given the economic importance of the Thai restaurant, hotel and catering services sector, this sector represents strong potential for U.S. products;
- Literate population due to comprehensive schooling, increased overseas studies, international travel, access to internet and cable TV;
- Over 10 percent of total population lives in Bangkok, which accounts for 90 percent of the sales of fast moving consumer goods;
- Most of medium and high-income people live in the major cities, including Bangkok, Phuket, Chantaburi, Chiang Mai, Chiang Rai, Chonburi, Hat Yai, Khon Kaen, Nakorn Ratchasima, Pattaya, Petchaburi, Ratchaburi, Samui Island, Surat Thani, Ubon Ratchatahni and Udon Thani;
- A stable and stronger Baht in 2004 led to an increase in imported consumer-oriented food products from the U.S;
- Over the past few years, Thais living in urban areas have become relatively brand conscious, less price-oriented and their shopping behavior has moved away from the traditional open-air wet markets to modern supermarkets and shopping centers which offer them convenience and a wide selection of products in a modern experience;
- High growth in the number of hotels, resorts and other tourist accommodations continues to lead to an increase in the number of imported food items purchased to support more tourists;
- Hotels and international restaurants play an important role in increasing consumer awareness about U.S. products, which may not be commonplace in the retail markets e.g. certain types of seafood, etc.
- Changing eating habits of Thais are helping to grow the restaurant business in Thailand. Consumers are now eating out more frequently, whenever they want to.
- Upper and middle-income groups in Thailand like to spend money on food, especially during the holidays, and also for daily consumption. Consumption of imported food products peak during New Year, Christmas, Chinese New Year and the Thai New Year seasons as gifts of food are given, especially consumer products such as coffee, tea, milk, snack foods, jelly, jam, crackers, nuts, fruit juice, wine, beer, whisky, health foods and fresh fruit;
- Continuous increases in the number of health-conscious consumers is leading to higher demand for health and functional food and drinks;
- Thai consumers view U.S.-origin foods and beverages as high quality and consistent products, for instance: U.S. beef, french fries, dried and fresh fruits, nuts, fruit juice, jams, and other products are always rated by local consumers as the best in the world. However, this perspective does not apply to all U.S. products as some local consumers still prefer wine from France, for example.

Advantages and challenges facing US products in Thailand

Advantages	Challenges
- Many varieties of superior U.S. high quality agricultural products from fresh to processed food. - Excellent opportunities exist for U.S. products targeting niche markets	- U.S. exporters don't know much about the Thai market and at the same time severe competition from China, Australia, New Zealand, Japan and other neighboring countries impedes the entry of U.S. products
- Increase of per capita income increased from $1,966 in 2002 to $2,196 in 2003 - GDP for 2005 is projected at 6 percent - Increase in Thai consumers' preference for higher quality products	- U.S. products are not always price-competitive compared to imports from other Asian countries due to high tariffs, shipping costs and time to Thailand
	- The bilateral free trade agreement between Thailand and other countries, particularly China, Australia, and India, induces the import of more low-price products from these trade partners
- Local Thai consumers view US-origin products as high quality and safe and are confident in U.S. foods and beverages consistency	- Local manufacturers can improve or change quality of products, tastes or packaging sizes according to changes in consumer behavior and can lower production cost
- Eating style of Thai people is changing to include more imported food items	- Lack of continuous promotion of U.S. varieties in Thai market. Exporters need to support market promotion campaigns to attract and build new markets
- Increase in niche markets with higher incomes and high premium product preferences	- Market penetration for imported products is concentrated in Bangkok and major tourist-destination provinces
- The booming tourism industry is ratcheting up demand for HRI products, especially U.S. beef, turkey, seafood, wine, fruits & vegetables, and seasonings which can be used in American, French, Japanese and other international style restaurants	- American style mass food products produced locally cost less
- Reliable supply of U.S. agricultural products and advanced U.S. food processing technology	- Thai government's policy and actions try to increase demands for Thai local products
- A wide range of restaurants and menus to meet demands of tourists requires a wide variety of products	- Very high import tariffs on high value consumer food and beverage products, especially U.S. meat products, wine, whiskies, cherries, peaches, plums, pears, French fries, etc.
- Thai importers prefer to deal with reliable U.S. suppliers who are able to supply products at competitive prices	- Lack of trader and consumer awareness of U.S. products, while marketing costs to increase consumer awareness are high
- Thailand's beneficial geographical location is viewed as a gateway to the larger Indochina and other Asian markets	-Due to the high import tariffs on U.S. products, most Thai importers have shifted to import less expensive products from other Asian countries, especially Australia, China, Malaysia, Singapore, etc.

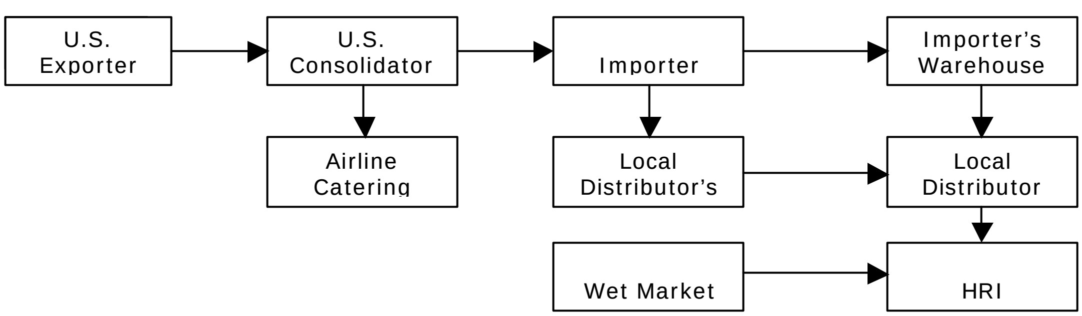
Food Show in Thailand
The International Food & Hospitality Show 2005 (IFHS 2005)
Date: September 14-17, 2005
Venue: The Queen Sirikit National Convention Centre (QSNCC), Bangkok

IFHS 2005 is organized by Bangkok Exhibition Services Ltd., part of The Montgomery Network, organizer of over 100 exhibitions annually. This annual trade show has been held in Thailand since 1990. It successfully incorporates Wine & Spirits Thailand, CleanTex Thailand & Bakery alongside with Retail Thailand. Visitors target for this show include hotels, supermarkets, department stores, grocery stores & retailers food & drink manufacturers and processors, importers, distributors, wholesalers, restaurants, bar & clubs, caterers, trade associations, fast food outlets, bakeries, wine importers, retailers, food & beverage managers, airlines, etc. U.S. exporters who are interested in exports food and beverages product for hotels & restaurants, retailers, food and beverage manufacturers should participate in the show. FAS Bangkok will provide support services to U.S. exhibitors including on-site booth within the U.S. pavilion and a market briefing for U.S. exporters who will participate in this show.

Thailand Organiser	Worldwide Associate	Asian Associate
Bangkok Exhibition Services Ltd. (BES) 62 Rama VI Soi 30 Rama VI Road, Samsennai, Phyathai, Bangkok 10400 Thailand Tel: 662-617-1475 Fax: 662-271-3223 Email: ifhs@besallworld.com Website: http://www.ifhs.net/	**Overseas Exhibition Services Ltd. (OES)** 11 Manchester Square, London W1U 3PL United Kingdom Tel: +44 (0) 20 7862 2121 Fax: +44 (0) 20 7862 2128 Email: pmarch@oesallworld.com	**International Expo Management Pte Ltd (IEM)** 47 Scotts Road #05-02 Goldbell Towers, Singapore 228 233 Tel: +65 6736 1221 Fax: +65 6736 1771 Email: enquiry@iemallworld.com

SECTION III: ROAD MAP FOR MARKET ENTRY

Direct contact with local food service importers is the best entry strategy for U.S. exporters. Hotels and resorts do not import food directly in volumes to be attractive to U.S. exporters. It is easier for hotels and resorts to order from food service importers because they specialize in providing high quality U.S. products to the five-star hotel and restaurant industry. Restaurants such as fast food chains or family style restaurants also order and purchase imported food from food service companies or from their affiliated companies who act as their distributors. Five star hotels and resorts are the heaviest users of U.S. products. International food restaurants located in the prime areas of Bangkok, Chiang Mai, Hua-Hin, Samui island, and Phuket island are secondary recommendations for U.S. exporters. Direct contact with catering services is highly recommended for first time market contact.



SECTION IV: BEST MARKET PROSPECTS

Best market prospects for U.S. suppliers include:

- American spices and seasonings
- Bakery and Baking products: flour, biscuits, pancake mixes, waffles, French toast, cookies, muffins, cakes, frosting and icings, and puff pastry
- Beverage: fruit and vegetable juice, wine, liquor, whisky, beer, cocktail mixes, and mineral water
- Canned foods (soup, fruit and vegetables)
- Condiments: bacon bits & toppings, barbecue and cocktail sauce, dips, hot sauce/pepper sauce, mayonnaise, mustard, olives, salsa and taco sauce, pickles, steak sauce, syrups, salad dressing, and vinegar
- Dairy products: cheese, processed cheese, whipped topping, sour cream, ice-cream, dips
- Fresh and frozen seafood such as fish fillets, scallop, lobster, mussel, oyster, halibut, cod fish, Alaska king crab, etc.
- Fresh fruit and vegetables (radish, celery, carrots, apples, grapes, cherries, kiwi fruit, avocados, blueberries, grapefruit, oranges)
- Jams, Jellies & Spreads
- Meat: frozen and chilled beef, poultry, processed meats (ham, sausage, deli meats)
- Potatoes: frozen French Fries, hash browns, shoestrings, etc.

Thailand Imports and US share of Top 50 Food and Fishery Imports – HRI market

No.	PRODUCT ITEMS	2002 TOTAL IMPORT VALUE ($)	2002 U.S. EXPORT VALUE ($)	2002 TOTAL IMPORT VOLUME	2002 U.S. EXPORT VOLUME	2002 %SHARE (VOLUME)	2003 TOTAL IMPORT VALUE ($)	2003 U.S. EXPORT VALUE ($)	2003 TOTAL IMPORT VOLUME	2003 U.S. EXPORT VOLUME	2003 %SHARE (VOLUME)
1	POWDER MILK & CREAM	177,459,330	6,073,071	111,666,634	5,156,704	4.62%	177,178,469	6,041,106	111,666,634	5,156,704	4.62%
2	WHISKIES	71,899,012	1,008,070	26,149,736	191,652	0.73%	89,645,267	1,278,316	30,682,264	321,998	1.05%
3	OTHER FOOD PREP	78,569,016	27,385,087	15,601,153	5,033,064	32.26%	81,417,118	31,556,010	16,676,417	4,437,395	26.61%
4	OTHER PREPS W/FLOUR MEAL OR STARCH	18,033,828	998,449	10,928,965	287,213	2.63%	74,731,338	1,970,230	250,135,771	1,022,952	0.41%
5	APPLE (FRESH)	39,867,674	11,744,644	49,813,117	11,277,112	22.64%	57,719,540	10,546,942	84,229,305	10,472,246	12.43%
6	SALMON (FROZEN,FRESH, CHILLED)	42,370,754	3,900,337	19,044,200	3,925,166	20.61%	51,350,037	4,145,972	19,175,543	3,163,809	16.50%
7	CRABS	25,085,578	1,152,405	3,802,350	135,315	3.56%	25,753,883	1,691,297	3,310,038	256,431	7.75%
8	CHOCOLATE & FOOD PREP. WITH COCOA	17,238,453	2,942,834	3,597,588	539,655	15.00%	19,855,546	2,952,025	4,529,095	562,847	12.43%
9	SUGAR CONFECTIONERY	16,708,202	157,785	6,133,216	46,522	0.76%	17,351,391	209,534	5,819,567	50,832	0.87%
10	MACKEREL	15,475,707	35,583	17,141,634	50,012	0.29%	16,317,256	357,584	18,068,520	310,982	1.72%
11	GRAPES, FRESH	7,046,413	3,999,320	4,331,356	2,209,993	51.02%	14,695,578	7,311,738	8,993,978	4,196,409	46.66%
12	OTHER SAUCES & PREP	7,540,300	1,564,162	2,604,699	799,888	30.71%	14,608,307	2,518,296	4,176,138	1,255,339	30.06%
13	PEARS & QUINCES	3,531,404	496	5,289,102	857	0.02%	14,462,809	9,624	25,501,172	8,493	0.03%
14	FRUIT & VEGETABLE JUICE	4,542,731	835,426	4,430,182	510,955	11.53%	12,740,926	2,602,895	10,480,247	1,581,355	15.09%
15	COD	11,449,293	1,041,264	4,958,210	511,868	10.32%	12,293,677	620,213	4,641,005	262,180	5.65%
16	INSTANT COFFEE	9,629,741	192,901	2,542,006	432	0.02%	12,028,770	403,607	9,344,780	44,122	0.47%
17	CANNED PEACH	12,439,228	687,620	17,110,863	798,652	4.67%	9,438,650	4,080,626	11,231,979	4,687,789	41.74%
18	FROZEN FRIES	7,351,777	5,031,943	11,676,364	8,149,578	69.80%	9,031,880	5,670,314	13,374,401	8,437,263	63.09%
19	SUNFLOWER/SUNFLOWER OIL (EDIBLE)	8,653,324	-	11,630,352	-	0.00%	8,736,975	403	11,352,035	45	0.00%
20	CHEESE & CURD	6,709,269	348,814	2,385,435	90,834	3.81%	8,372,817	273,901	2,928,693	82,301	2.81%
21	WINE	6,942,750	247,996	5,547,283	220,391	3.97%	7,046,482	319,862	5,368,980	234,228	4.36%
22	BREAKFAST CEREAL	4,517,366	97,606	2,429,404	35,671	1.47%	5,655,781	213,763	2,729,626	78,347	2.87%
23	SOUPS & BROTHS & PREPARATION	3,369,846	744,757	812,086	383,522	47.23%	4,384,278	1,472,385	1,203,119	573,466	47.66%
24	DRIED PEAS, BEANS, LENTILS	2,202,063	171,361	6,670,652	137,537	2.06%	4,056,483	426,852	9,961,292	474,187	4.76%
25	INSTANT TEA	1,227,776	1,104,734	122,631	106,094	86.51%	3,670,164	705,516	3,693,349	66,084	1.79%
26	BEER	1,727,027	53,806	3,933,953	96,540	2.45%	2,947,800	37,209	3,939,906	45,925	1.17%
27	ALMONDS, FRESH/DRIED IN SHELL & SHELLED	1,658,351	1,589,741	540,682	516,219	95.48%	2,656,893	2,641,758	733,042	728,744	99.41%
28	MEAT OF BOVINE ANIMALS FRESH/CHILLED/FROZEN	2,692,858	654,649	1,147,712	298,755	26.03%	2,548,999	705,141	894,914	240,095	26.83%
29	JAMS, FRUIT JELLIES	1,840,850	765,390	844,306	323,325	38.29%	2,097,037	814,526	898,593	318,038	35.39%
30	ICE CREAM	1,502,896	263,820	545,631	69,661	12.77%	1,794,132	56,529	717,320	11,730	1.64%
31	TOMATO KETCHUP & OTHER TOMATO SAUCES	969,331	504,722	1,402,025	598,978	42.72%	1,676,090	315,317	2,592,485	377,605	14.57%
32	SCALLOPS/CLAMS	467,823	42,224	193,299	4,925	2.55%	1,285,192	108,069	472,962	11,952	2.53%
33	COFFEE	750,459	580,739	74,769	53,784	71.93%	1,237,741	952,858	208,207	86,649	41.62%
34	OTHER NUTS INC MIXTURES	677,980	239,404	337,444	103,533	30.68%	974,844	349,314	425,169	129,238	30.40%
35	SARDINES	493,836	55,560	631,654	71,055	11.25%	968,016	358,599	1,357,182	545,207	40.17%
36	PISTACHIOS, FRESH/DRIED	622,655	497,459	166,043	114,836	69.16%	747,954	599,967	213,040	146,124	68.59%
37	ORANGE (MANDARIN, TANGERINES, SATSUMA)	426,761	111,774	813,213	176,202	21.67%	714,727	150,163	1,295,765	245,160	18.92%
38	CHERRIES (FRESH)	339,370	167,209	82,601	41,209	49.89%	695,896	474,954	203,683	149,551	73.42%
39	MUSTARD FLOUR & MEAL&PREPARED MUSTARD	602,362	256,358	298,022	147,661	49.55%	623,198	281,029	293,769	170,273	57.96%
40	MEAT OF SHEEP/LAMB	390,142	473	292,677	431	0.15%	499,602	266	355,750	241	0.07%
41	CHAMPAGNE	391,355	-	40,618	-	0.00%	390,464	-	40,618	-	0.00%
42	RAISINS	248,075	223,170	204,364	184,814	90.43%	342,938	336,385	271,343	263,681	97.18%
43	SAUSAGES & SIMILAR PRODUCTS OF MEAT	133,381	2,003	25,214	1,038	4.12%	295,547	9,053	54,918	4,687	8.53%
44	GROUND NUTS	118,101	71,470	66,285	20,036	30.23%	271,990	81,115	214,492	25,739	12.00%
45	SEA BASS	17,307	-	13,311	-	0.00%	186,974	-	16,310	-	0.00%
46	PLUMS AND SLOES	81,111	56,314	46,059	33,948	73.71%	132,101	99,972	99,038	64,518	65.14%
47	TURKEY & CUT OFFALS F/F	72,267	72,267	96,640	96,640	100.00%	101,170	101,170	138,186	138,186	100.00%
48	OTHER SPARKLING WINES	125,807	5,359	111,781	3,762	3.37%	97,951	3,040	88,176	4,410	5.00%
49	PEACHES, INCL NECTARINES	65,521	5,288	110,683	4,110	3.71%	54,028	8,480	35,130	4,319	12.29%
50	ALMOND (ROASTED)	2,750	2,037	533	205	38.46%	16,260	11,972	2,880	2,155	74.83%

Source: Thai Customs Department

SECTION V: CONTACT INFORMATION

Hotels and Resorts

Amari Watergate Hotel
847 Petchburi Rd.
Pratunam, Rajthevi
Bangkok
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Fax : 662-653-9045
Contact : Mr. Sanjog Modgil, Director of Food & Beverage
E-mail : fb@atrium.amari.com
Website : www.amari.com

Amari Atrium Hotel
1880, New Petchburi Road,
Huay Kwang, Bangkapi
Bangkok 10320
Tel: 662-718-2000
Fax: 662-718-2004
Contact: Mr. Sanjog Modgil, Director of Food & Beverage
E-mail : fb@atrium.amari.com
Website: www.amari.com

Bangkok Marriott Resort and Spa Hotel
257 Charoennakorn Road,
Bangkok 10600
Tel: 662-476-0022
Fax: 662-477-0811
Contact: Russell Paine, Director of Food & Beverage
E-mail :
Contact : John Westoby, Director of Operations
E-mail : jwestoby@minornet.com
Website: www.marriotthotels.com/bkkth

Banyan Tree Bangkok
21/100 South Sathorn Road,
Sathorn, Bangkok 10120
Tel: 662-679-1200
Fax: 662-679-1188
Contact: Scott Murray, Director of Food and Beverage
E-mail: scott.murray@banyantree.com
Website: www.banyantree.com

Conrad Hotel
All Seasons Place,
87 Wireless Road,
Bangkok 10330
Tel: 662-690 9999
Fax: 662-690 9000
Contact: Nattapol Khajornsripitak, Executive Assistant Manager
E-mail: nattapol@conradbangkok.com
Website: www.conradhotels.com

Dusit Thani Hotel
946 Rama IV Road,
Bangkok 10500
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Four Seasons Hotel
155 Rajadamri Road,
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Fax: 662-253-9195
Contact: Lubosh Barta, Director of Food and Beverage
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Website: www.fourseasons.com/bangkok

Grand Hyatt Erawan Bangkok
494 Rajdamri Road,
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Fax: 662-254-6286
Contact: Chris Conway, Director of Food and Beverage
E-mail: chris.Conway@hyattintl.com
Website: www.bangkok.hyatt.com

Intercontinental Bangkok Hotel
973 Ploenchit Rd., Lumpini
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Tel : 662-656-0444
Fax : 662-656-0555
Contact : Kym Barter
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Website: http://bangkok.intercontinental.com/

JW Marriott Hotel
4 Sukhumvit Road, Soi 2,
Bangkok 10110
Tel: 662-656-7707
Fax: 662-656-7711
Contact: Mr. Stefan Gruber, Food and Beverage Director
E-mail: Stefan.gruber@marriotthotels.com
Website: www.marriott.com

Montien Hotel Bangkok
54 Surawongse Road
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Tel : 662-233-7060
Fax : 662-234-8060
Contact : Mr. Piyawin Sukondhavich
E-mail: fbbkk@montien.com
Website : www.montien.com

Peninsula Hotel
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Fax: 662-861-1112
Contact: Mr. Joseph Sampermans, Director of Food and Beverage
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Website: http://bangkok.peninsula.com

Royal Orchid Sheraton Hotel
2 Captain Bush Lane, New Road,
Siphya, Bangkok 10500
Tel: 662-266-0123
Fax: 662-236-8320
Contact: Dario Orsini, Director of Food and Beverage
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Shangri-La Hotel
89 Soi Wat Suan Plu,
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Website: www.shangri-la.com

Sheraton Grande Sukhumvit Hotel
250 Sukhumvit Road
Bangkok 10110
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Fax 662-653-0400
Contact: Dennis J. Thouvard, Director of Food and Beverage
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Website: www.sheratongrandesukhumvit.com

Sofitel Central Plaza Hotel
1695 Phaholyothin Rd,
Chatuchak, Bangkok 10900
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Contact: Wuthisak Pichayagan, Food and Beverage Manager
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Website: www.centralhotelsresorts.com

Sukhothai Hotel
13/3 South Sathorn Road,
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Contact: Anne-Marie Houston, Executive Assistant Manager of Food and Beverage
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Website: www.sukhothai.com

Tawana Ramada Hotel
80 Surawongse Rd.
Bangkok
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Fax : 662-236-3738
Contact : Mr. Chatchawarn Hiranyaman
E-mail : twn99@tawanahotel.com
Website : www.tawanahotel.com

The Oriental Hotel
The Oriental, Bangkok 48 Oriental Avenue,
Bangkok 10500
Tel: 662-659-9000
Fax: 662-659 0000
Contact: Eric Weber, F&B Manager
E-mail : ericw@mohg.com
Website: www.mandarin-oriental.com/bangkok

Restaurants

13 Coins Restaurant
13 Coins Towers Ltd.
525/3 Ratchadapisek Road,
Huaykwang, Bangkok 10310
Tel: 662-274-1219
Fax: 662-274-1218
Contact: Somchai Nitiwanakul, Managing Director

Bourbon St. Bar and Restaurant
Texxan Co., Ltd.
29/4-6 Behind Washington Theatre
Sukhumvit Soi 22,
Bangkok 10110
Tel: 662-259-0328/9
Fax: 662-259-4318
Contact: Douglas B. Harrison, Managing Director
Website: www.bourbonstbkk.com

Hamilton's Steak House
Dusit Thani Hotel
946 Rama IV Road,
Bangkok 10500
Tel: 662-236-9999
Fax: 662-236-6400
Contact: Thitikorn Pitchan, Assistant F&B Manager

Hard Rock Café
424/1, 424/3-6 Siam Square Soi 11
Pathumwan, Bangkok 10330
Tel: 662-251-0792/94
Fax: 662-254-0832
Contact: James Choong, General Manager
Website: www.hardrockcafe.co.th
Outback Steakhouse

OBS Restaurant Thailand Limited.
2nd Floor Siam Discovery Centre
Rama 1 Road, Pathumwan
Bangkok 10330
Tel: 662-658-0202
Fax: 662-658-0204
Contact: Ajay Verma, Proprietor

Neil's Tavern Restaurant
58/4 Soi Ruam Rudee,
Wireless Road, Bangkok 10330
Tel: 662-256-6874-6
Fax: 662-650-9740
Contact: Pipat Pitsanusakorn, Managing Director

New York Steakhouse
2nd Floor, JW Marriott Hotel
4 Sukhumvit Road, Soi 2,
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Fax: 662-656-7711
Contact: Mr. Stefan Gruber, Food and Beverage Director

Park Avenue Steak House
Panumas Marketing & Distribution Co., Ltd.
G/F, Mercury Tower,
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Fax: 662-658-7892
Contact: Panumas Pornvarakorn, Proprietor

Roses Are Red (Steak and Seafood Restaurant)
413/5 Sukhumvit Soi 55
(Between Thonglor 23-25) Bangkok
Tel: 662-392-1881-2
Fax: 662-392-4530
Contact: Triphong Kohengkul, Managing Director

S & P Syndicate Public Company Limited
457-457/6 Soi Sukhumvit 55 Vadhana
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Tel: 662-381-3412
Fax: 662-381-2790

Seafood Palace International (Seafood Market and Restaurant)
Euro Emporium Co., Ltd.
348 Sukhumvit Road., Asoke Sq.,
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Fax: 662-653-1149
Contact: Nucha Kathapithak, General Manager

Tony Roma's
Mas Millennium (Thailand) Ltd.
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Institutional/Catering Contacts

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Fax: 662-247-5726
Contact: Hugues Reveille, Managing Director
M.L. Chaninprom Kamalasana, Purchasing Manager

Thai Airways International Plc.
Bangkok International Airport,
Donmuang, Bangkok 10210
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Fax: 662-504-4057
Contact: Suchada Tiyavanich, Duty Manager Procurement Section

Siam Flight Services Ltd.
Bangkok International Airport
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Gate Gourmet (Thailand) Ltd.
71 Chaengwattana Road,
Kwaeng Talad Bangkhen,
Khet Laksi, Bangkok 10210
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Contact: Kanyanan Chullabut, Purchasing Manager

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A. Pakkred, Nonthaburi 11120
Food and Beverage Department
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Bangkok International Trade and Exhibition Centre
8 Bangna-Trad (Km.1),

Bangna, Bangkok 10260
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F&B International Co., Ltd.
Queen Sirikit National Convention Center
60 New Rachadapisek Road, Klongtoey,
Bangkok 10110
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Fax: 662-229-3174
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Food Service Importers

Fine Food International Co., Ltd.
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Intermarco Co., Ltd.
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Pan food Co., Ltd.
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Don's Foods Co., Ltd.
48/5 Sai yuan Road, Moo7,
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BJC Marketing Co., Ltd.
99 Soi Rubia, Sukhumvit 42 Road,

Phrakanong, Klongtoey,
Bangkok 10110
Tel. 662-367-1111
Fax. 662-712-2241
Email: bjcwine@berlijucker.co.th
Contact: Praphol Vongsrivongse, Acting General Manager

Cannon Pacific Co., Ltd.
188/3 Soi Sukhumvit 63 (Ekamai),
Klongton Nua,
Bangkok 10110
Tel. 662-391-6318
Fax. 662-391-6320
Contact: Mr. Ekachai Mahaguna, Managing Director

Cititex Enterprises Co., Ltd.
40/29 Moo 5, Karnchanapisek Road,
Bangbon, Bangkok 10150
Tel. 662-895-1761
Fax. 662-895-3958
Contact: Mr. Sithisak Chatamornwong, Managing Director

California Wine Co., Ltd, The
498-504 Sukhumvit 22, Besides Washington Theatre,
Sukhumvit Road, Klongton,
Bangkok 10110
Tel. 662-260-5794-5
Fax. 662-260-5807
Contact: Mr. Sorasit Wongsantivanich, General Manager

Diethelm & Co., Ltd.
2439 Old Paknam Railway Road,
Klongton, Klongtoey,
Bangkok 10110
Tel. 662-672-5535-39 Ext 101
Fax. 662-672-2569
E-mail: kritkasp@spd.diethelm.co.th
Contact: Mr. Kritkasem Panyarachun, Sales & Marketing Manager, Food/Special Products Div.

Global Premium Wine Co., Ltd.
295 Rama 3 Road, Bangkorlaem,
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Tel: 662-689-0441-3
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E-mail: info_globewine@yahoo.com

Italthai Industrial Co., Ltd.
2 Soi Soonvijai 3, New Petchburi Road,
Bangkapi, Huaykwang,
Bangkok 10320
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Thungsonghong, Laksi,
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Mr. Vichai Kanchanasevee, Assistant Managing Director

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Fax. 662-656-8182/3
Contact: Mr. Dominique Forey, Managing Director
Mr. Kittipong Dechaampai, Managing Director

Wine Gallery
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POST CONTACT AND FURTHER INFORMATION

The Foreign Agricultural Service in Bangkok maintains up-to-date information covering food and agricultural import opportunities in Thailand and would be pleased to assist in facilitating U.S. exports and entry to the Thai market. Questions or comments regarding this report should be directed to the Foreign Agricultural Service in Bangkok at the following local or U.S. mailing address:

Local:	**U.S. Mail**:
Office of Agricultural Affairs U.S. Embassy 120-122, Wireless Road Bangkok 10330 Tel. +662-205-5106 Fax. +662-255-2907 Email: Agbangkok@usda.gov Home page: www.usdathailand.org www.fas.usda.gov	Office of Agricultural Affairs U.S. Embassy, Box 41 APO AP 96546

End of Report.